



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

1 Charles David Tucker (Estate)
Former Executor: Terry Tucker (pro per)
Successor Administrator: Public Administrator

Case No. 0522981

Probate Status Hearing RE: Filing of an Inventory and Appraisal and Filing of a First or Final Account

DOD: 3/4/1994	TERRY TUCKER was appointed as Executor with full IAEA and without bond on 1/17/1995.	NEEDS/PROBLEMS/COMMENTS: Continued from 6/15/16. Minute order states the Court orders Terry Tucker to provide the Public Administrator with any and all information on Chuck's Transmission that pertains to assets in the past and present. This includes but is not limited to bank statements, payroll and income taxes. These documents and information need to be provided within 48 hours of the PA requesting. 1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 1/17/1995.	
	Inventory and Appraisal was due June 1995.	
Cont. from 042016, 050416, 061516	Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.	
Aff.Sub.Wit.	First account or petition for final distribution was due March 1996.	
Verified	Minute Order dated 1/20/16 states the Court orders Terry Tucker removed as Executor and appoints the Public Administrator. Mr. Tucker reports that the home was lost to foreclosure in 1996, but there are vehicles and a business.	
Inventory	Letters for the Public Administrator issued on 4/22/16.	
PTC	Status Report filed on 6/15/16 states according to a grant deed recorded on 12/22/1978, the land on which Chuck's Transmission Service, Inc. is located was transferred to Charles D. Tucker and Jo Ann Willingham as tenants in common. Thereafter, an Offer to Acquire Securities was executed on 8/2/1990 by Mr. Tucker and Ms. Willingham, and was accepted that same date by Mr. Tucker as President of the corporation and Ms. Willingham as secretary. The assets included the real property.	
Not.Cred.	The Franchise Tax Board reports Chuck's Transmission Service as "not in good standing with the [FTB]." The California Bureau of Automotive Repair states that the business license status is "delinquent."	
Notice of Hrg	Please see additional page	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/20/16
		Updates:
		Recommendation:
		File 1- Tucker

Status Report filed on 6/15/16 (cont.) Terry Tucker, as executor of this estate, sold the estate's real property located at 357 N. Lind in Fresno to Isabel Carranco and Juanita Chavez. According to the Notice of Proposed Action filed on 12/12/1995, the purchase price was \$89,000.

The Order for Probate appointing Terry Tucker as executor was filed on 1/7/1995. This matter was not referred to the Public Administrator until 21 years later on 1/20/16. He has still not been able to determine the status of the vehicle, but the business appears to be open. However, Terry Tucker has not provided contact information for a CPA or bookkeeper, to the Public Administrator cannot advise what assets/liabilities there may be in Chuck's Transmission Service, Inc.

The Public Administrator requests that this Court again order the former administrator, Terry Tucker, to turn over all information and documents, and assist the Public Administrator in all ways possible to resolve this matter.

Attorney: John Garland (for Margie Gfeller – Spouse/executor)

Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 11/25/07	MARGIE GFELLER , spouse, was appointed executor without IAEA and without bond on 03/18/08. <i>Letters</i> issued 05/13/08.	NEEDS/PROBLEMS/COMMENTS:
		Minute order dated 1/20/2016 continued this matter to 7/27/2016 and states the Court admonishes that this will be the last continuance absent extraordinary good cause. No appearance is necessary at the status hearing if the petition is filed at least two court days prior.
Cont. from 010314, 030714, 050214, 073114, 081414, 091814, 121814, 041615, 073015, 012016	Subsequently, an order granting full IAEA was granted 07/10/08. <i>Letters</i> issued 07/14/08.	1. Need accounting/report of administrator and petition for final distribution.
Aff.Sub.Wit.	I&A partial no. 1 - \$210,000.00	<div> <div> <div>Reviewed by: SEF</div> <div>Reviewed on: 7/21/2016</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 2 – Gfeller</div> </div> </div>
Verified	I&A partial no. 2 - \$835,000.00	
Inventory	Notice of Status Hearing filed 10/31/13 set this matter for status regarding failure to file a first account and/or petition for final distribution.	
PTC	Status report filed 7/20/2016.	
Not.Cred.	The federal and state tax liens and/or liabilities must be resolved prior to the preparation of a petition for final distribution. In light of the foregoing, counsel requests this matter be continued again, for approximately six months. Counsel believes that the IRS and FTB tax liabilities can be resolved during that time period and a petition for final distribution can be filed soon after the resolution of those corporate tax liabilities.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp	See status report for details.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Status RE: Termination of California Conservatorship proceedings

		BRIAN and ROSA LONG , parents, were appointed co-conservators on 4/5/10.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 7/13/16</u>
		On 6/1/16, the Court set this status hearing re termination of California conservatorship proceedings and sent notice to the attorney, the co-conservators and the Conservatee.	
Cont. from 071316			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
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Letters			
Duties/Supp			
Objections			
Video Receipt			
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9202			
Order			
Aff. Posting			
Status Rpt		Reviewed on: 7/20/16	
UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice		File 3- Long	

4 The Christina Romar Beneficiary Trust (Trust)**Case No. 10CEPR00596****Attorney: Stanley J. Teixeira (for Trustee Pamela Benitez)****Probate Status Hearing RE: Filing of the Third Account**

		PAMELA BENITEZ , Professional Fiduciary on behalf of GOOD SHEPARD FUND , is Trustee.	NEEDS/PROBLEMS/COMMENTS:
		Property on hand for the Second Account was \$67,078.18	Continued from 6/22/16.
Cont. from 062216		The Second Account, for the account period ending 8/25/13, was approved on 8/25/14.	1. Need third account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Aff.Sub.Wit.			
Verified		Minute order dated 8/25/14 set a status hearing for the filing of the third account.	
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: KT
Status Rpt			Reviewed on: 7/21/16
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 4- Romar

5 Zachary Filgas (GUARD/P)**Case No. 10CEPR00914****Attorney: Michael N. Splivalo (for Rachel Stauffer-Case – Petitioner)****Attorney: Zepure "Zeppy" Attashian (for Elaine Thomas – Guardian)****Petition for Visitation**

		RACHEL STAUFFER-CASE , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		ELAINE THOMAS , paternal grandmother, was appointed guardian on 8/16/2013.	<u>Continued to 10/5/2016</u> @ request of counsel
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 7/21/2016
			Updates:
			Recommendation:
			File 5- Filgas

Status RE: Termination of California Conservatorship proceedings

			<p>BRIAN and ROSA LONG, parents, were appointed co-conservators on 5/30/13.</p> <p>On 6/1/16, the Court set this status hearing re termination of California conservatorship proceedings and sent notice to the attorney, the co-conservators and the Conservatee.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 7/13/16</p>
Cont. from 071316				
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 7/20/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 6- Long

Petitioner: Brianna Lyn Cutting (Pro per)

Guardian: Sharron Ann Horner (Pro per)

Petition for Visitation

		<p>BRIANNA LYN CUTTING, mother, is petitioner.</p> <p>SHARRON ANN HORNOR, maternal grandmother, was appointed guardian of Riley only, on 7/25/2013.</p> <p><i>See petition for details.</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Petition is as to <u>Riley Horner</u> only.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service at least 15 days before the hearing of the Notice of Hearing on: <ol style="list-style-type: none"> a. Sharron Ann Horner (guardian) 	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 7/21/2016	
			Updates:	
			Recommendation:	
			File 7- Hornor/ Cutting	

Probate Status Hearing re: Proof of Notice to DMV

	FREMONT BANK , former Trustee, petitioned the court for approval of their first and final account.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 4/27/16. Minute order states Counsel represents that they are still awaiting processing by the DMV. If proof of paperwork having been processed is not filed, then a written status report must be filed at least two court days prior to 7/27/16.
Cont. from 080315, 083115, 113015, 031416, 032316	HERB THOMAS is the current successor trustee.	<ol style="list-style-type: none"> Need proof that the Trust is a lienholder on the vehicle or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Aff.Sub.Wit.	The first and final account showed that Fremont Bank as Trustee for the Trust purchased a handicap equipped van for the beneficiary and distributed the van directly to the beneficiary.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order dated 6/29/15 states the court orders that the DMV is to be noticed that the Trust shall be the lienholder for the vehicle. Counsel is to submit a declaration verified by Herb Thomas.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Former Status Report filed on 11/25/15 states Charities Pooled Trust (CPT) has been attempting to secure a lien on the vehicle, however it may not do so until the DMV issues and Electronic Lien Title (ELT). The DMV has informed CPT that the ELT will not be available until January 2016. Once the ELT is received they will be able to place CPT as a lienholder on the vehicle.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/21/16
		Updates:
		Recommendation:
		File 8 – Bertoldi

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 2/24/14		<p>RACHELLE IRELAND, Daughter, was appointed Executor with Full IAEA without bond on 4/16/15.</p> <p>At hearing on 4/16/15, the Court set this status hearing re filing the first account or final account.</p> <p>Status Report filed 3/22/16 states the decedent owned a one half interest in her residence on N. Callisch in Fresno with her partner, Gary Pritchard. The short sale completed 8/21/15 with no proceeds to the estate. The rental property in North Fork was listed for sale and recently the realtor Rusty Smith moved out of the North Fork area and unlisted the property without proper notification.</p> <p>The Executrix was in the process of finding another realtor when Chase Bank notified her and the tenants that they are starting foreclosure proceedings. The date of death appraised value is \$105,000. The mortgage is approx. \$83,000. The rental payments were going towards the monthly mortgage payments. The property taxes more than doubled in 2015-2016, which caused a significant rise in the monthly mortgage payment from \$626.36 to \$818.08. Rent is \$740, but Bass Lake Realty is the property manager who collects rent and handles day to day management, so after their pay, net rent received is \$666. The estate had previously raised the rent, but due to the dilapidated condition and many issues with the property, it cannot be raised any further.</p> <p>Because there were limited funds in the estate, it could no longer pay the shortfall and was forced to stop making the monthly mortgage payments in November 2015. The renters are currently still in the property and making their monthly payments. In the beginning of March, Chase Bank served notices of intent to start foreclosure proceedings. The attorney has been in contact with Jan Ramos, the property manager, and she has informed her that the tenants intend to stay as long as possible. It is to the estate's advantage to keep the tenants in the rental property as long as possible.</p> <p>The decedent also owned some minimal miscellaneous stocks that the estate is in the process of liquidating.</p> <p>The estate cannot close until foreclosure proceedings for the North Fork property have concluded. Therefore, further continuance of 90 days is requested.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: On 6/29/16, there were no appearances and the Court set the OSC at Page B.</p> <p>Minute Order 3/23/16: The Court reviews a letter dated 2/23/16 from Trustee Corp. stating that the mortgage loan for the North Fork property was referred to their firm for foreclosure; the letter further states that parties may have alternatives available to avoid sale. Counsel represents that there is not enough funds in the estate to get the property out of foreclosure. The Court admonishes that the personal representative may be held responsible for any losses.</p> <p>As of 7/20/16, nothing further has been filed.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report per Local Rule 7.5.</p>
Cont. from 061215, 071515, 090915, 032316, 062916			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
✓ Letters	4/17/15		
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Order to Show Cause

DOD: 2/24/14	RACHELLE IRELAND , Daughter, was appointed Executor with Full IAEA without bond on 4/16/15.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account or Petition for Final Distribution or current written status report per Local Rule 7.5.
Aff.Sub.Wit.	At hearing on 4/16/15, the Court set a status hearing re filing the first account or final account for 6/12/15.	
Verified		
Inventory	At continued hearing on 6/29/16, there were no appearances and the Court set this Order to Show Cause hearing.	
PTC		
Not.Cred.		
Notice of Hrg	Minute Order 6/29/16: NO APPEARANCES. The Court issues an Order to Show Cause to Lisa Horton as to why she should not be sanctioned for her failure to appear and as to Rachelle Ireland as to why she should not be removed as Executor for failure to file the first/final account or status report, Lisa Horton or a representative for her and Rachelle Ireland are ordered to be personally present in court or present via CourtCall on 7/27/16.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: skc
Reviewed on: 7/20/16
Updates:
Recommendation:
File 10B- Stafford

Probate Status Hearing Status RE: First Account

		PUBLIC GUARDIAN was appointed Conservator of the Estate on 2/11/15 and Letters issued 2/20/15. At the hearing on 2/11/15, the Court set this status hearing for the filing of the First Account. Status Report filed 4/12/16 states the Public Guardian has been short-staffed and requests an additional 90 days.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account pursuant to Probate Code §2620 or written status report per Local Rule 7.5.
Cont. from 041316			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
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<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc Reviewed on: 7/20/16 Updates: Recommendation: File 11- Cross

12 Frank Cambio (Estate) Case No. 15CEPR00104**Attorney Boyajian, Thomas M. (for JoAnne M. Ling – Executor)****Probate Status Hearing RE: First or Final Account**

DOD: 12/20/2014	JOANNE M. LING , was appointed Executor with full IAEA without bond on 03/11/2015.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 05/11/2016: If accounting filed 2 days before hearing, status may come off calendar. 1. Need First Account or Petition for Final Distribution.
Cont. from 051116	Letters issued on 03/13/2016	
Aff.Sub.Wit.	Final Inventory & Appraisal filed 0714/2015 shows an estate valued at \$702,352.62	
Verified		
Inventory		
PTC		
Not.Cred.	Minute Order of 03/11/2015 set this Status Hearing for the filing of the First or Final Account.	
Notice of Hrg		
Aff.Mail	Status Report filed 07/12/2016 states at the last hearing Mr. Boyajian informed the Court that the real property located in Riverside, Ca. was presently in escrow and should close in a few weeks. A problem arose between the buyer and his lender. Presently the buyer and the lender are attempting to resolve their issues. Mr. Boyajian still believes the buyer will purchase the property, but no date is certain.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 07/21/2016
		Updates:
		Recommendation:
		File 12- Cambio

Petition for Authorization for the Conservator to Spend More Than Co-Payment for an Evaluation.

			<p>PUBLIC GUARDIAN, Conservator, is petitioner.</p> <p>Petitioner states despite the Public Guardian's best efforts, Kaiser will not provide the evaluation that Mr. Fanucchi has requested. Their response is they "don't do those evaluations." Unfortunately, due to his attorney's objection and request for another evaluation, the conservatee will have to pay for this evaluation at a much higher amount. Based upon the estimates the Public Guardian has received from private doctors, she requests authority to pay up to \$3,000 for the evaluation and report.</p> <p>Petitioner prays,</p> <ol style="list-style-type: none"> The Court authorize the Public Guardian to pay up to \$3,000 in order to obtain an evaluation of the conservatee. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 6/27/16. Minute order states Flora Istanbulian requests an updated capacity declaration from the general practitioner. The Court allows the expense for Kaiser not limited to the \$50 co-payment. Ms. Istanbulian has no objection for medical powers. The Court grants medical powers.</p> <p>1. Need Order</p>
Cont. from 032816, 062716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
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	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: KT</p> <p>Reviewed on: 7/21/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13A- De La Mora</p>	

13A

Petition for Exclusive Authority to Give Consent to Medical Treatment

		PUBLIC GUARDIAN , Conservator, is petitioner. Petition requests: a. That the conservatee be adjudged to lack the capacity to give informed consent to medical treatment. b. That the conservator be granted the exclusive authority to give consent to medical treatment. Declaration of Joseph Alimasuya, M.D. dated 5/26/15 supports the request for medical treatment.	NEEDS/PROBLEMS/COMMENTS: Continued from 6/27/16. Minute order states Flora Istanbulian requests an updated capacity declaration from the general practitioner. The Court allows the expense for Kaiser not limited to the \$50 co-payment. Ms. Istanbulian has no objection for medical powers. The Court grants medical powers. Please see page 13A Petition for Authorization for the Conservator to Spend More Than Co-Payment for an Evaluation.	
Cont. from 032816, 062716				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 7/21/16	
			Updates:	
			Recommendation:	
			File 13A- De La Mora	

Status RE: Filing of the Inventory and Appraisal

DOD: 6/6/15		GENARO A. SALAS , Spouse, was appointed Administrator with Limited IAEA Authority and without bond on 1/27/16. Letters issued on 1/27/16.	NEEDS/PROBLEMS/COMMENTS:
			Minute Order 6/29/16: NO APPEARANCES. The Court issues an Order to Show Cause to Genaro Salas as to why he should not be removed as Administrator for failure to file an Inventory and Appraisal. Genaro Salas is ordered to be personally present in court or appear by CourtCall on 7/27/16. See Page B.
Cont. from 062916		At the hearing on 1/27/16, the Court set this status hearing for the filing of the Inventory and Appraisal.	1. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
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Duties/Supp			
Objections			
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Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 7/20/16
			Updates:
			Recommendation:
			File 14A- Salas

14A

Order to Show Cause

DOD: 6/6/15	<p>GENARO A. SALAS, Spouse, was appointed Administrator with Limited IAEA Authority and without bond on 1/27/16. Letters issued on 1/27/16.</p> <p>At the hearing on 1/27/16, the Court set status hearing for the filing of the Inventory and Appraisal on 6/29/16.</p> <p>On 6/29/16, Mr. Salas did not appear and the Court set this Order to Show Cause.</p> <p><u>Minute Order 6/29/16:</u> NO APPEARANCES. The Court issues an Order to Show Cause to Genaro Salas as to why he should not be removed as Administrator for failure to file an Inventory and Appraisal. Genaro Salas is ordered to be personally present in court or appear by CourtCall on 7/27/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</p>	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
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Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 7/20/16	
		Updates:	
		Recommendation:	
		File 14B- Salas	

Probate Status Hearing RE: Proof of Additional Bond Based on the Filed**Value****of the Estate**

DOD: 10/4/2015	RONALD FREEMAN , father, was appointed administrator with will annexed with full IAEA. Bond was set at \$150,000.00. <i>Letters issued 12/18/2015</i>	NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> Additional bond filed on 7/13/16.
Cont. from 061516, 062916		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: KT		
Reviewed on: 7/21/16		
Updates:		
Recommendation:		
File 15- Freeman		

Petitioner: Jamie Crawford (pro per)

Petition for Modification of Visitation

		JAMIE CRAWFORD , guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		JAMIE CRAWFORD , paternal grandmother, was appointed guardian on 4/12/16.	1. Notice of Hearing.
Cont. from		Please see petition for details.	2. Need proof of service of the Notice of Hearing, not later than 15 days prior to the hearing, on: a. Rayanna Perez (mother)
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 7/21/16
			Updates:
			Recommendation:
			File 16- McCue

Petitioner Floresa Winchester-Wagner (Pro Per, granddaughter)
 Attorney Marvin T. Helon (Court-appointed for proposed Conservatee)

Petition for Appointment of Probate Conservator

		TEMPORARY DENIED	NEEDS/PROBLEMS/COMMENTS:
		FLORESA WINCHESTER-WAGNER , granddaughter, is Petitioner and requests appointment as Conservator of the Person.	Continued from 5/25/2016. Minute Order states Floresa is informed that everything filed has to be served on anyone legally entitled to notice. Kimberly gave Floresa her address in open court. Objections must be filed and served by 7/20/2016.
Cont. from 042016, 052516, 062916			
	Aff.Sub.Wit.		
✓	Verified	~Please see petition for details~	
	Inventory		
	PTC		
	Not.Cred.	Court Investigator's Report was filed on 4/13/2016.	
✓	Notice of Hrg		Note for background: Minute Order dated 5/25/2016 from a previous hearing states, in pertinent part, that the Court gives permission for notice via Facebook or text messages that contain all pertinent information.
✓	Aff.Mail	W / O	The following defects from the last hearing remain:
	Aff.Pub.		1. Petitioner filed on 3/21/2016 a <i>Corrections to Petition for Appointment of Probate Conservator</i> filed 3/10/2016, indicating that Item 1(k) of the <i>Petition</i> should be marked to request orders relating to dementia placement or treatment. If Petitioner continues to seek dementia powers, need Attachment Requesting Special Orders Regarding Dementia (Judicial Council form GC-313.)
	Sp.Ntc.		2. <i>Capacity Declaration</i> of Ajit Singh Khaira, M.D., filed 3/18/2016 is incomplete and does not support the request for dementia powers, nor the request for medical consent powers. Need <i>Medical Capacity Declaration</i> (Judicial Council form GC-335) in support of Petitioner's request pursuant to Probate Code § 1890(c).
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: LEG
	Status Rpt		Reviewed on: 7/21/16
	UCCJEA		Updates:
✓	Citation		Recommendation:
	FTB Notice		File 17- Grant

Petition to Determine Succession to Real Property

DOD: 7/7/2009		MARGARET ANN BAKER , daughter, is petitioner 40 days since DOD No other proceedings I&A - \$135,000.00 Will dated 8/25/1997 devises all of decedent's estate to Margaret Ann Baker. Petitioner requests Court determination that decedent's 100% interest in real property located at 37784 Sharewood Lane, Squaw Valley CA (including a mobile home), pass to her in its entirety, pursuant to decedent's will.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 061616				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 7/20/2016	
			Updates:	
			Recommendation: SUBMITTED	
			File 18- Woodward	

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 3/10/16		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued to 8/8/16</u> at the request of the attorney.</p>
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: KT
		Reviewed on: 7/21/16
		Updates:
		Recommendation:
		File 21- LaPlante

Attorney Marvin T. Helon (for Petitioner Patrick J. Mon Pere, Sr., Trustee)

Petition for Settlement of Trustee's Account, for Allowance of Compensation, and Instructions for Termination and Final Distribution of Trust

James H. Wallace, Jr. DOD: 12/27/2001		PATRICK J. MON PERE, SR., Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states:	
Cont. from		<ul style="list-style-type: none"> On 11/17/1997, JAMES H. WALLACE, JR., as Settlor and Trustee established the JAMES H. WALLACE, JR. LIVING TRUST, which was amended and restated in full on 8/16/2000 (<i>copy of trust as amended and restated attached as Exhibit I</i>); Petitioner became the trustee of all trusts created by the JAMES H. WALLACE, JR. LIVING TRUST upon the death of the Settlor, and is currently trustee of all trusts created under the Trust, including the ASHTON MITCHELL CHACON TRUST; The Trust provided for 75% of the residue of the original trust estate to be allocated to ASHTON MITCHELL CHACON, the grandson of the Settlor, and held in trust for his benefit pursuant to the terms of the ASHTON MITCHELL CHACON TRUST; Petitioner funded the Trust with 75% of the residue per Trust terms; On 3/16/2004, Petitioner filed in Case 04CEPR00304 his accounting for administration of the JAMES H. WALLACE, JR. LIVING TRUST for 12/27/2001 through 12/31/2003, which reported Petitioner's distribution to and establishment of the ASHTON MITCHELL CHACON TRUST; <i>Judgment Settling Account, etc.</i>, dated 8/9/2004 approved Petitioner's accounting; 	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		~Please see additional page~	Reviewed by: LEG Reviewed on: 7/22/16 Updates: Recommendation: File 22- Chacon

22 First Additional Page Ashton Mitchell Chacon Trust Case No. 16CEPR00628

- Petitioner now presents for approval and settlement his accounting and report for administration of the **ASHTON MITCHELL CHACON TRUST**, comprised of annual and bi-annual account periods and reports attached as Exhibits II through X, with supporting schedules [as specified];

First Account Period: May 2, 2003 through December 31, 2005

Accounting	-	\$839,700.15
Beginning POH	-	\$0.00
Ending POH	-	\$770,428.85

Second Account Period: January 1, 2006 through December 31, 2007

Accounting	-	\$841,434.07
Beginning POH	-	\$770,428.85
Ending POH	-	\$786,563.82

Third Account Period: January 1, 2008 through December 31, 2009

Accounting	-	\$837,129.88
Beginning POH	-	\$786,563.82
Ending POH	-	\$720,400.31

Fourth Account Period: January 1, 2010 through December 31, 2010

Accounting	-	\$744,329.99
Beginning POH	-	\$720,400.31
Ending POH	-	\$708,082.87

Fifth Account Period: January 1, 2011 through December 31, 2011

Accounting	-	\$728,784.94
Beginning POH	-	\$708,082.87
Ending POH	-	\$686,145.67

Sixth Account Period: January 1, 2012 through December 31, 2012

Accounting	-	\$706,730.55
Beginning POH	-	\$686,145.67
Ending POH	-	\$666,678.12

Seventh Account Period: January 1, 2013 through December 31, 2013

Accounting	-	\$719,726.95
Beginning POH	-	\$666,678.12
Ending POH	-	\$625,581.52

Eighth Account Period: January 1, 2014 through December 31, 2014

Accounting	-	\$644,308.44
Beginning POH	-	\$625,581.52
Ending POH	-	\$543,366.60

Ninth Account Period: January 1, 2015 through December 31, 2015

Accounting	-	\$558,691.19
Beginning POH	-	\$543,366.60
Ending POH	-	\$456,332.93

~Please see additional page~

Supplemental Cash Account and Changes Period: January 1, 2016 through May 20, 2016:

Since the close of the Ninth Account period, Petitioner has disbursed funds to or for the beneficiary and paid expenses of administration; total cash on hand December 31, 2015 was **\$79,230.33, \$5,338.21** of which was held in a Westamerica checking account and **\$73,892.12** of which was then held in an insured cash account with Linsco/LPL Financial; cash on hand at December 31, 2015 has since been reduced by disbursements; *Exhibit XI* provides a list of cash additions and disbursements since December 31, 2015 and reports cash on hand as **\$37,148.29** as of May 20, 2016 and shows changes occurring since December 31, 2015.

- Petitioner has administered the trust and made distributions to assist in providing for the education of **ASHTON MITCHELL CHACON**, who is presently pursuing a college education and degree at the University of San Diego; Petitioner as trustee has paid from the trust estate tuition and other educational expenses as set forth in his accountings;
- Petitioner has received no compensation from the Trust for his services as trustee; Trust Instrument authorizes the payment of reasonable compensation to the trustee; Petitioner should be authorized and allowed to pay to himself a reasonable sum from the trust for his services as trustee, which is substantially in excess of **\$10,000.00** for the approximate thirteen (13) year period of administration beginning in May of 2003 when Petitioner began providing services as trustee; however, petitioner requests only **\$10,000.00** for his services for this period (*Exhibit "XII"* describes services provided by petitioner and support for the compensation requested);
- Petitioner retained the services of and compensated the following persons:
 - **HELON & MANFREDO LLP**, Attorneys at Law, to provide legal services in connection with administration of the trust;
 - **DeMERA, DeMERA & CAMERON**, Certified Public Accountants, to prepare income tax returns and accountings for the trust;
 - **LINSCO PRIVATE LEDGER FINANCIAL**, financial advisors, to provide professional investment management for trust financial investments.
- Trust terms provide for the Trust to terminate and the remaining principal and any undistributed income of the trust estate to be distributed to **ASHTON MITCHELL CHACON** when he attains age **21**, which occurred in February 2016; Petitioner proposes to terminate the trust and its administration and distribute the remaining trust estate to **ASHTON MITCHELL CHACON**, free of trust, except for the cash shown on hand in *Exhibit XI*; the cash remaining on hand after payment of trustee's fees approved by the Court and final expenses of administration and of terminating the Trust, will be distributed to **ASHTON MITCHELL CHACON** when such final expenses are paid.

Petitioner prays for an Order:

1. Settling, allowing and approving the Accounts and Report of the Petitioner as Trustee;
2. Confirming and approving the acts and proceedings of Petitioner as Trustee;
3. Approving the compensation requested for the trustee's services and authorizing Petitioner to pay himself the sum of **\$10,000.00** from the trust estate for his services as trustee;
4. Allowing and authorizing Petitioner to withhold from distribution at this time the cash sum of **\$37,148.29** for final expenses of administration, including payment of Trustee's fees approved by the Court, the preparation and filing of final income tax returns for the trust, final accounting fees and Court filing fees, and legal fees in connection with presenting Petitioner's account, report and this *Petition*;
5. Authorizing and instructing Petitioner to terminate the Trust and its administration and distribute the remaining Trust estate after the retention set forth in the *Petition*, to **ASHTON MITCHELL CHACON** free of trust.

DOD: 07/27/2015	PUBLIC ADMINISTRATOR , was appointed Administrator with Will Annexed, with full IAEA without bond on 02/17/2016.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 072016	Letters issued 02/29/2016	<u>OFF CALENDAR.</u>
Aff.Sub.Wit.		<u>Final Inventory and Appraisal filed 07/20/2016.</u>
Verified	Minute Order of 02/17/2016 set this Status Hearing for the filing of the Final Inventory and Appraisal.	Note: Petition for Order Determining Heirship was filed 07/08/2016. Hearing is set for 08/17/2016.
Inventory		
PTC		
Not.Cred.	Status Report Regarding Filing Inventory and Appraisal filed 07/18/2016 states the Public Administrator signed the Inventory and Appraisal, and it is currently with the probate referee for completion. Therefore, it is requested that this status hearing be continued for at least 30 days from the date of this hearing.	1. Need Inventory and Appraisal.
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 07/18/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 25- Knapp